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Inventory Management Series

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NOTE

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If you find page references near the right hand margin of this standard they indicate the pagination of the official, printed version of this standard. For example, a notation "PAGE 2, 4/88, TS-87" would mean that (1) page two of the printed version begins here, (2) the date of issuance was 4/88, and (3) the Transmittal Sheet number was TS-87.

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SERIES DEFINITION

This series includes positions that involve analytical work in managing, regulating, coordinating, or otherwise exercising control over supplies, equipment, or other material. The work includes one or more phases of material management including initial planning, provisioning and requirements determination, acquisition and distribution, accountability, and ultimate issue for consumption, retention, or disposal. The work requires knowledge of acquisition processes, automated records and control systems, material substitution criteria, and storage, issue, and disposal processes.

This series coverage standard supersedes the classification standard for the Inventory Management Series dated April 1966.

EXCLUSIONS

1. Classify positions in the [Supply Clerical and Technician Series, GS-2005](#), when they involve clerical or technical support of supply work and the full performance level is lower than grade GS-9.
2. Classify positions in the [General Supply Series, GS-2003](#), when they require full substantive knowledge of this and at least one other specialized supply series.
3. Classify positions in the [Equipment Specialist Series, GS-1670](#), when the work involves determining or recommending the range and quantity of repair parts and tools necessary to support a component or system of equipment, and where the decisions are based primarily on the application of an intensive practical knowledge of the characteristics, properties, and uses of equipment.
4. Classify positions in the [Logistics Management Series, GS-346](#), when they involve directing, developing, or performing logistics management operations that involve planning, coordinating, or evaluating the integrated logistical actions required to support a specified mission, weapons system, or other designated program.

OCCUPATIONAL INFORMATION

Included in this series are positions the principal duties of which involve analytical work in managing and controlling material. Employees apply knowledge of systems, techniques, and underlying management concepts for determining, regulating, or controlling the level and flow of supplies from initial plan through acquisition, storage, issue, and utilization or disposal. In addition, knowledge of specific programs is used by some employees who specialize in providing

the material support needs peculiar to assigned items of equipment, weapon systems, or special programs such as construction, maintenance, or modification.

The three primary functions that characterize the occupation are management, coordination, and control of inventory and systems of inventory management.

1. Inventory Management includes the integrated management and control of assigned items of material. The work involves a number of processes such as:
 - (a) Requirements Determination - Planning for and determining current and future supply requirements to meet customer needs;
 - (b) Material Distribution - Planning and determining the distribution and positioning of supplies among major supply stations, stock points, or using activities;
 - (c) Procurement Authorization - Preparing recommendations and directives for the procurement of material, indicating the types of items, quantities, and at all times, the sources; and
 - (d) Funds Management - Analyzing planned or scheduled material requirements and forecasts to determine categories and quantities of items, as well as funds required.

The material management systems developed by the various Federal agencies differ since they are tailored to meet the needs of the agencies concerned. Consequently, differences are often found in policy, organization, delegations of responsibility, relative emphasis given to supply effectiveness and cost, and the extent to which automated data processing systems are used. Regardless of those differences, inventory management involves several common elements. Among the more important of these are:

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- utilization of increasingly sophisticated electronic data processing systems as integral parts of material control, record, and data communications systems;
- use of scientific or business type decision rules and formulas to make material control decisions that optimally balance cost and material support effectiveness;
- development and implementation of various material standardization programs;
- planning and coordinating material actions to assure properly phased support to major items of equipment and/or weapon systems in test phases, in production, in service, and during phaseout periods; and

- monitoring the quality of input and output of automated inventory management systems and recommending system and programming changes to improve timeliness, accuracy, and utility of inventory information for users.
- 2. Material Coordination focuses on material support for particular projects, work operations, or programs including work such as:
 - (a) Monitoring the status and effectiveness of material support by identifying, analyzing, and resolving problems.
 - (b) Reviewing and analyzing operational reports and plans, work schedules, planned requirements, and other data to determine and advise on compatibility of planned support programs.
 - (c) Determining, initiating, and coordinating required actions by establishing and maintaining liaison with inventory managers, contractors or vendors, and planning organizations to schedule or advise as to timing of procurement, delivery, or emergency transportation.
 - (d) Participating in or serving as chairperson at meetings or conferences concerning levels of material support, timing, locations, and related inventory requirements.
 - (e) Conducting special supply and demand studies and advising on procedures to be followed and reviewing financial data to determine reprogramming requirements.

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Coordination of material support requires knowledge of material, work sequences, and schedules in shops or other industrial operations, and the specialized needs of the programs or operational areas supported. Judgment and independence of action are required in applying supply management concepts, organizing inventory management assignments, and taking actions on the basis of delegations of responsibility. Similarly, material coordination assignments require considerable judgment in analyzing and determining the impact on material needs caused by changes in production or operational schedules, work sequences, and plans. (Decisions made strictly in accordance with written or oral instructions, directives, guides, established procedures, and formulas do not meet this criteria.) Some of the major results achieved through liaison and coordination processes include:

- Computing material requirements or estimates for budget, procurement, disposal, provisioning, or other special programs; and
- Initiating or requiring action leading to identification, cataloging, procurement, maintenance, or disposal of items of material. Depending upon particular agency policies and patterns of delegated authority, employees in this series recommend, request, authorize, or require that the indicated actions are taken by the organizational entities responsible for them.

3. Inventory Control includes performing one or more of a wide variety of staff or administrative functions such as:
- (a) Initiating, developing, installing, or administering a control program.
 - (b) Providing guidance on or conducting surveys of supply and inventory management functions.
 - (c) Analyzing, evaluating, revising, or developing new inventory management systems.
 - (d) Developing long-range material support plans.
 - (e) Directing, guiding, or reviewing material support programs, functions, and actions implemented by others; and/or
 - (f) Performing quality assurance and review functions.

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Inventory specialists satisfy these responsibilities by:

- Controlling and authorizing funding for material so that the proper kind, quality, and quantity are available at the correct time and place.
- Maintaining records and controls over material in stock, due in, or planned for the distribution system on a quantitative and monetary basis; and
- Controlling the distribution or redistribution of stock within the supply system.

Inventory management work is classified in this series when duties and responsibilities demonstrate that the preponderance of the work requires performing most of the preceding functions and, at least three of the following:

- Managing items with difficult supply and demand patterns related to seasonal factors, program changes, changes in end-use applications, and similar elements;
- Making supply system decisions which consider more than the status of an individual item or the problem presented by a particular supply transaction, e.g., interchangeability of items among different equipment or systems;
- Exercising substantially independent authority to --
 - o establish and revise reorder frequencies;
 - o establish stock levels for individual items on a selective basis; and

- o manage assigned items in such a manner as to achieve effective supply support while remaining within authorized or available funds;
 - Programming requirements for assigned items, including phasing procurements and deliveries and determining best use of funds saved through judicious management;
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- Reviewing planned work programs, schedules, and other planning data -- advising others regarding major categories of material which will be needed -- and pointing out material areas most likely to cause difficulties;
 - Planning and coordinating material support for assigned program or project areas including extensive provisioning conferences and personal contacts to negotiate stock levels, phased production, changes in work schedules, or other means of alleviating material problems;
 - Serving as a central point of contact and exchange of information for personnel of supply, production, maintenance, and other organizations relative to material support problems affecting an assigned program or project area;
 - Recommending changes in automated data bases and systems of data storage, formats, and reports; and/or
 - Participating in planning for new data processing systems in terms of defining the nature of information required, organizational responsibilities, computer network requirements, and the nature of output desired from inventory management systems.

TITLES

Inventory Management Officer is the title for managerial positions with overall inventory program responsibility for an organization.

Inventory Management Specialist is the title for all non supervisory positions.

Supervisory Inventory Management Specialist is the title for positions that meet the criteria in the appropriate [supervisory grade evaluation guide](#) for classification as supervisors.

GRADING POSITIONS

The grade levels of positions classified in this series are determined by applying criteria contained in the [Grade Evaluation Guide for Supply Positions](#) or the appropriate [supervisory grade evaluation guide](#).